

PRESS RELEASE
ODDO BHF AM's multi-asset-fund range goes international with new brand "ODDO BHF Polaris"

Düsseldorf, Frankfurt, Paris, 26 June 2018

As part of its ongoing efforts to standardise its fund range, ODDO BHF Asset Management will soon distribute its offering of diversified funds throughout Europe under a new joint brand name: **ODDO BHF Polaris**. Being managed now by ODDO BHF AM under the responsibility of Laurent Denize, the funds will continue to be advised (as it has been the case for more than 10 years now) by ODDO BHF TRUST, an entity of the private bank ODDO BHF AG based in Frankfurt. The four funds of ODDO BHF Polaris range now total almost €1.5 billion of assets under management. Their investment process is centred on managing risks and stock-picking in Europe and the US.

ODDO BHF Polaris' four funds all feature a wealth-management approach focusing on companies' solidity and long-term performance. Stock selection is informed by fundamental analysis – a strong and proven expertise of ODDO BHF AM.

The Polaris brand evokes the Polar Star, which has guided sailors from time immemorial. "ODDO BHF Polaris funds are designed to offer our clients guidance amid volatile and, at times, erratic markets" explained Nicolas Chaput, CEO and co-CIO at ODDO BHF AM.

The two flagship funds are ODDO BHF Polaris Moderate and BHF Value Balanced FT (to be soon renamed into ODDO BHF Polaris Balanced).

	AuM as of 31 May 2018	Morningstar Rating	Equity exposure	Investment management company	Investment advisor
ODDO BHF Polaris Balanced BHF Value Balanced FT	€295m	★★★★★ <i>Moderate, Global Allocation category</i>	From 35% to 60%	ODDO BHF AM Lux	ODDO BHF TRUST Tilo Wannow
ODDO BHF Polaris Moderate	€463m	★★★★★ <i>Cautious Allocation category</i>	From 0% to 40%	ODDO BHF AM GmbH	ODDO BHF TRUST Peter Rieth

The teams that have proven themselves over many years and the well-established investment processes are not subject to change.

	Performance 31 Dec. 2017 to 31 May 2018	3 years	5 years	Since inception	Since inception (annualised)	Volatility over 3 years
ODDO BHF Polaris Balanced (CR-share) BHF Value Balanced FT	0.7	6.5	35.2	60.3	4.6	8.4
<i>Morningstar quartile as of end-May 2018: Moderate, Global Allocation category</i>		Q1	Q1			
ODDO BHF Polaris Moderate (CR-share)	-0.3	2.7	13.5	46.3	3.0	3.7
<i>Morningstar quartile as of end-May 2018: Morningstar Cautious Allocation category</i>		Q2	Q2			

Past performances are not a reliable indicator of future performances and are not constant over time.

Fund characteristics	ODDO BHF Polaris Balanced / BHF Value Balanced FT	ODDO BHF Polaris Moderate
Inception date	8 October 2007	15 July 2005
Fund domicile	Luxembourg	Germany
Investment management firm	ODDO BHF AM Lux AG	ODDO BHF AM GmbH
Investment advisor	ODDO BHF TRUST	ODDO BHF TRUST
Depository bank	CACEIS Bank Luxembourg	Bank of New York Mellon

CVs

Laurent Denize, Global Co-CIO, ODDO BHF AM

Laurent has been Global co-CIO since 2013. He joined ODDO BHF AM in 2012 as senior bond manager and head of investment solutions. Prior to that, he founded Anakena Finance in 2006 and held the position of Chairman of DDF Exclusive. From 2001 he was responsible for proprietary trading for equity-linked products at Caisse des Dépôts. Laurent started his career in 1992 at Crédit Lyonnais where he first worked as interest-rate broker, moving later on to credit and trading.

Laurent holds an actuarial degree (IAF), is a graduate of ESC Toulouse and holds a Master's Degree in Banking and Finance from Lyon II.

Tilo Wannow, CEFA, CIIA, portfolio manager/analyst, ODDO BHF TRUST

Tilo joined BHF Capital Management in 2004 as a buy-side analyst in sectors with global coverage, including consumer goods, retailing, and travel & leisure. Since 2007, he has been a portfolio manager at ODDO BHF TRUST and advises the BHF Value Balanced FT fund.

Tilo holds a master's degree in European economic studies from the University of Bamberg.

Peter Rieth, CFA, portfolio manager/analyst, ODDO BHF TRUST

Peter joined ODDO BHF-Bank in 2001 as a buy-side analyst, covering the automobile, industrial and construction sectors. Since 2007, he has been a portfolio manager at ODDO BHF TRUST and advises the ODDO BHF Polaris Moderate fund.

From 1996 to 2001 Peter was a market-maker in options.

Peter holds a master's degree in finance from the University des Applied Sciences of Trier and a master of science (MSc) in banking and international finance from the University of Southampton.

About ODDO BHF Asset Management

ODDO BHF AM is part of the independent Franco-German financial group ODDO BHF that was founded in 1849. ODDO BHF AM is an independent asset management leader in Europe. The asset management of the ODDO BHF Group comprises ODDO BHF AM GmbH in Germany, ODDO BHF AM SAS and ODDO BHF Private Equity SAS in France, which together manage assets totaling € 61,5 billion. ODDO BHF AM offers its institutional and wholesale clients a unique range of high-performance investment solutions in all main asset classes, i.e. European equities, quantitative strategies, fixed income, multi-asset solutions and private equity. On a combined basis, 70% of assets under management are from institutional clients and 30% from distribution partners. The teams operate from investment centers in Dusseldorf, Frankfurt and Paris with additional locations in Luxembourg, Milan, Geneva, Stockholm and Madrid. ODDO BHF AM puts the long-term support of its clients at the heart of its priorities. Its independence allows its teams to be responsive, flexible and innovative in order to constantly find solutions tailored to the customers' needs.

www.am.oddo-bhf.com

About ODDO BHF TRUST

ODDO BHF TRUST is a Frankfurt-based investment-management and financial-services company and a subsidiary of ODDO BHF AG. ODDO BHF TRUST pursues a long-term investment policy based on a fundamental approach. Its investment expertise is available to HNWI and foundations/endowments.

About ODDO BHF

ODDO BHF is an independent Franco-German financial services group, with a history stretching back over 160 years. It was created from the alliance of a French family-owned business built up by five generations of stockbrokers and a German bank specialising in Mittelstand companies. With 2,300 employees (1,300 in Germany and 1,000 in France and Tunisia), and more than 100 billion euros in assets under management, ODDO BHF operates in three main businesses, based on significant investment in market expertise: private banking, asset management and corporate and investment banking. The Group has a specific ownership structure as 60% of its capital is held by the Oddo family and 30% by employees. This "partnership" ethos guarantees the long-term involvement of its teams. In 2017, ODDO BHF generated net banking income of 591 million euros, and at 31 December 2017, the Group had over 844 million euros of shareholders' equity.

www.oddo-bhf.com

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